ASSOCIATION OF BAY AREA GOVERNMENTS

Representing City and County Governments of the San Francisco Bay Area

ABAG

TO: Bay Area CMA Executive Directors and Planning Directors   DATE: September 5, 2014

FR: Duane Bay, Assistant Planning Director, ABAG

RE: Summary of ABAG Data Gathering Efforts for PDA Investment and Growth Strategies

Summary:

In July of 2014 ABAG contacted the region's 75 PDA jurisdictions to obtain housing policy data and 2013 housing permitting information. The purpose of this data collection effort was to gather information about the affordability levels and location of the housing permits issued in 2013 to aid CMAs in preparing their annual PDA Investment and Growth Strategy reports. ABAG staff examined the only two data sources which track housing permitting activity by income level – annual housing element progress reports to State HCD and local permitting data. In addition, ABAG tracked, and confirmed with local staff, thirty policy and program types, that represent the most prevalent and important strategies for fostering development of both market rate and affordable housing units.

Bay Area Housing Permitting Activity 2013*

County	VLI	LI	Mod	Above Mod	Total Units	In PDAs	Outside PDAs	Unknown
Alameda County	569	52	128	1914	2,663	62%	30%	8%
Contra Costa County	117	45	411	782	1,355	6%	40%	53%
Marin County	1	2	2	20	25	0%	0%	100%
Napa County	27	7	109	45	188	0%	94%	6%
San Francisco County	464	204	44	1787	2,499	92%	1%	7%
San Mateo County	60	82	65	1383	1,590	62%	25%	13%
Santa Clara County	296	257	441	5120	6,114	56%	31%	13%
Solano County	58	0	1	268	327	0%	85%	15%
Sonoma County	65	140	160	278	643	43%	56%	1%
Bay Area Totals	**1,657**	**789**	**1,361**	**11,597**	**15,404**	**57%**	**29%**	**14%**

*Please note that due to rounding error not all percentages add up to 100%

Key Findings:

- In 2013 PDA jurisdictions issued 15,404 housing permits
- 57% or 8,753 housing units were permitted in PDAs
- 29% or 4,472 housing units were permitted outside of PDAs
- 14% or 2,179 housing units did not include enough location information to discern whether or not they were permitted within PDAs. In such cases, jurisdictions did not track location (either through addresses or assessor parcel numbers). Most such units (63%) were single family homes with a few multi-family properties.

Affordability Levels:

- 75% or 11,597 housing units permitted were affordable to above moderate-income households
- 9% or 1,361 housing units permitted were affordable to moderate-income households
- 5% or 789 housing units permitted were affordable to low-income households
- 11% or 1,657 housing units permitted were affordable to very low-income households

Housing Policies:

The five housing policies adopted most broadly in PDA jurisdictions are:

1. Density Bonus ordinances: 66 PDA jurisdictions (an additional 5 have one under consideration)
2. Mixed-use zoning: 64 PDA jurisdictions
3. Reduced parking requirements: 60 PDA jurisdictions
4. Inclusionary zoning ordinances: 57 PDA jurisdictions (1 jurisdiction has one under consideration)
5. Condominium Conversion ordinances: 55 PDA jurisdictions

Next Steps:

ABAG is working on the following tasks to be completed in the Fall 2014/Spring 2015:

- 2007-2014 RHNA progress report: ABAG will finish gathering housing permit data for all Bay Area jurisdictions to monitor progress towards meeting the region's 2007-2014 Regional Housing Need Allocation.
- Mapping Housing Element Opportunity sites: ABAG is in the process of mapping housing opportunity sites identified by Bay Area jurisdictions in their 2007-2014 Housing Elements (to be updated with 2015-2022 housing site information once those are completed). This information will be made publicly available online.
- Housing Policy Database: ABAG will develop the initial summary of housing policies into a more detailed database that will be shared online.